The Aluminum Situation

A Monthly Publication of
The Aluminum Association, Inc., 818 Connecticut Avenue, NW, Washington, DC 20006

Economic Affairs Department 202-862-5100 A 0400 - 1 December, 1979

Shipments Up 2.3 Per Cent

Net shipments of aluminum ingot and mill products through October, 1979, at an estimated 12,213 million pounds were 2.3% higher than shipments of 11,941 million pounds for 10 months of 1978.

Domestic shipments totalled 11,401 million pounds through October, 1979, representing an increase of 0.4% over the 11,360 million pounds shipped in the first 10 months of 1978.

Exports of 812 million pounds so far this year were up 39.8% vs. 581 million pounds for 10 months of 1978.

Thru October 1979

	10 Mos. 1979	10 Mos. 1978	% Change
Mill Products	9,878	9,810	+ 0.7
Ingot	2,335	2,131	+ 9.6
Total	12,213	11,941	+ 2.3
Less Exports	−812	−581	+39.8
Domestic Total	11,401	11,360	+ 0.4

Millions of Pounds

Source: Latest month estimated by the Aluminum Association. Previous data—Bureau of the Census.

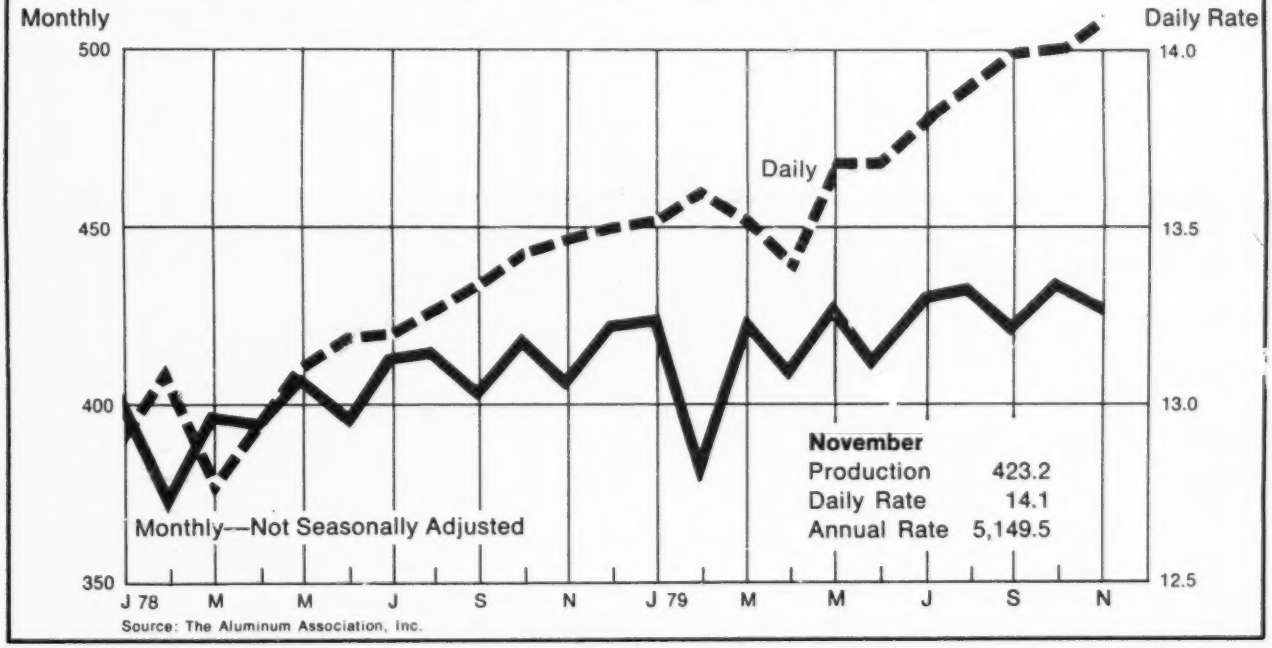
Primary Production Rate Up 4.9 Per Cent

U.S. primary aluminum production averaged 14,108 short tons daily during November, 1979, compared with an average 13,448 tons a day in November, 1978.

The annual rate of production in November, 1979 was 5,149,469 tons, compared to 4,908,690 tons in November, 1978. The October production rate was 5,119,031 tons.

Actual production in November, 1979, was 423,244 tons. This compared with 403,454 tons in November, 1978 and 434,767 tons in October, 1979.

U.S. Primary Aluminum Production—Thousands of Short Tons



Source: The Aluminum Association, Inc.

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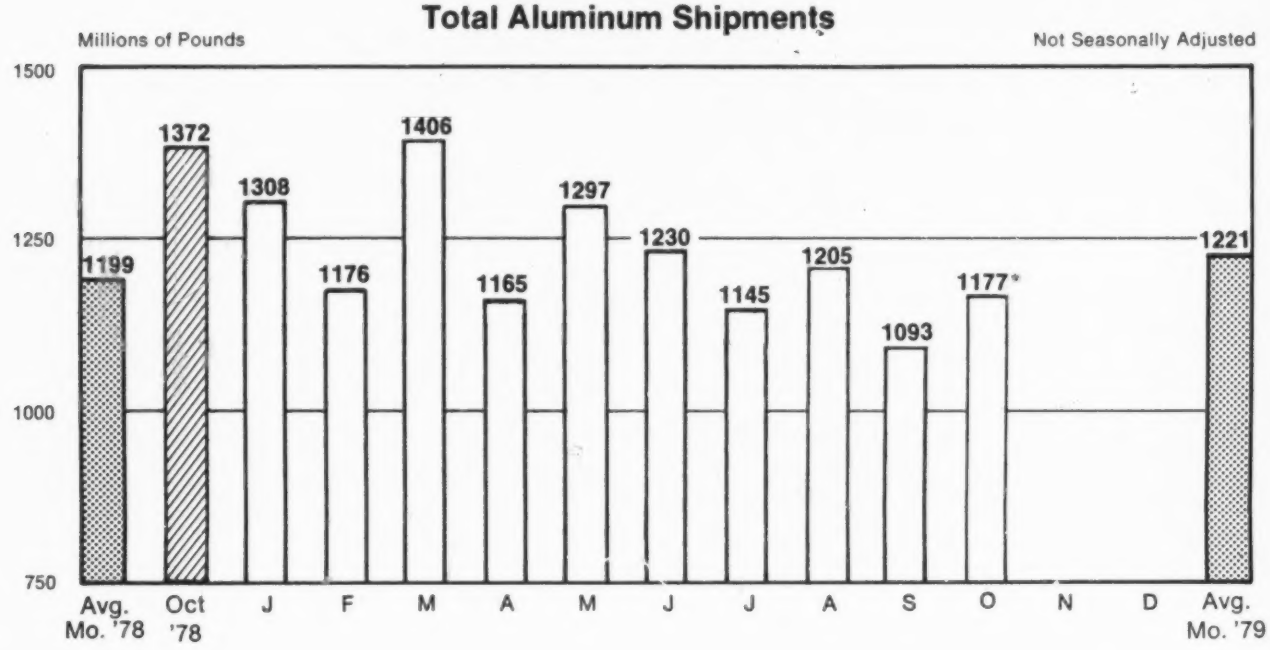
Total Aluminum Shipments



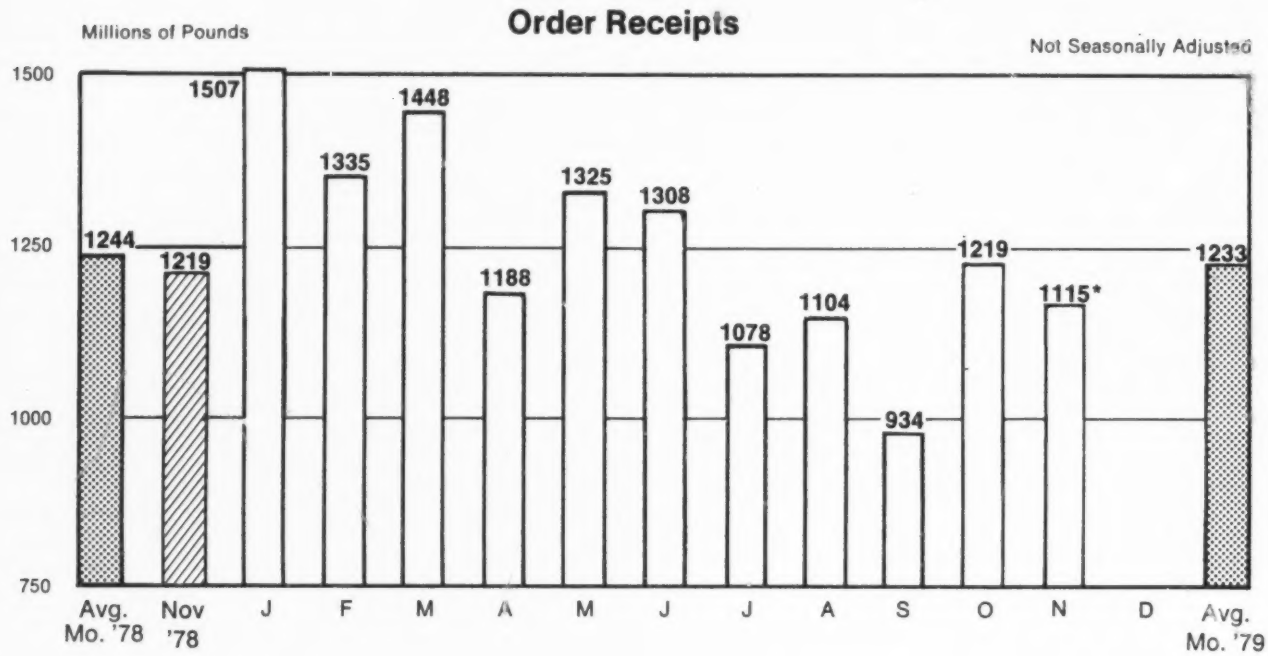
Net Shipments
(Millions of Pounds)

	1979		1978	% Change Latest Month
	October*	September	October	1979 v. 1978
Sheet & Plate	498.0	489.9	575.2	−13.4
Foil	75.0	66.1	76.6	− 2.1
Rod, Bar & Wire	41.0	35.0	30.7	+33.6
Electrical Conductor	77.0	68.1	72.5	+ 6.2
Extruded Products	196.0	166.5	226.0	−13.3
Welded Tube	6.0	4.2	5.1	+17.6
Powder & Pigments	9.0	11.8	10.8	−16.7
Forgings & Impacts	13.0	8.6	11.7	+11.1
Net Imports of Mill Products (Total) (a)	19.0	17.9	31.9	−40.4
Total Mill Products	934.0	868.1	1,040.5	−10.2
Ingot	243.0(b)	224.7	331.3	−26.7
TOTAL INDUSTRY SHIPMENTS	1,177.0	1,092.8	1,371.8	−14.2
Exports	(97.7)	(60.9)	(71.1)	+37.4
TOTAL DOMESTIC SHIPMENTS	1,079.3	1,031.9	1,300.7	−17.0

* Latest month estimated by the Aluminum Association.
Previous data—Bureau of the Census and Department of Commerce.
(a) Not included in product data above.
(b) Sufficient data not available for reliable estimate. Implicit in this item is a 10 to 25% variation.
r—revised.

October Shipments Down 14.2 Per Cent from Year Ago

Total October net shipments of 1,177 million pounds were down an estimated 14.2% vs. October, 1978. They were also up about 7.7% from September, 1979 shipments of 1,093 million pounds. Domestic shipments were down 17.0% below October, 1978, but 4.6% above September, 1979.



Order Receipts

Millions of Pounds

	1979		1978	% Change
	November*	October	November	Latest Month 1979 v. 1978
Can Stock	185.4	211.9	140.0	+32.4
Sheet & Plate, Other	287.1	287.8r	350.6	−18.1
Foil	67.2	74.6r	76.2	−11.8
Rod, Bar & Wire	25.4	25.8r	20.1	+26.4
Electrical Conductor	50.4	74.3	75.6	−33.3
Extruded Products	151.4	187.8r	235.9	−35.8
Primary Ingot	61.7	48.9	82.5	−25.2
Other (Including Secondary Ingot)	194.2	229.4	152.1	+27.7
TOTAL DOMESTIC	1,022.8	1,140.5r	1,133.0	− 9.7
Exports	92.5	78.8	85.5	+ 8.2
TOTAL ALL PRODUCTS	1,115.3	1,219.3r	1,218.5	− 8.5

Source: The Association estimates total industry orders, based on weekly reports by members of new orders (less cancellations) received. The Association expands these data to total industry utilizing an expansion ratio that attempts to reflect the relationship of reporters to the total industry. Weekly data are available upon request.

* Latest month.
r-revised.

November Orders Down 8.5% From Year Ago

November order receipts at 1,115 million pounds were down 8.5% from November, 1978 orders of 1,219 million pounds, coincidentally, the same volume as in the previous month of October, 1979. Cumulative eleven month orders totalled 13,560 million pounds, about 1.2% less than 11 months of 1978.

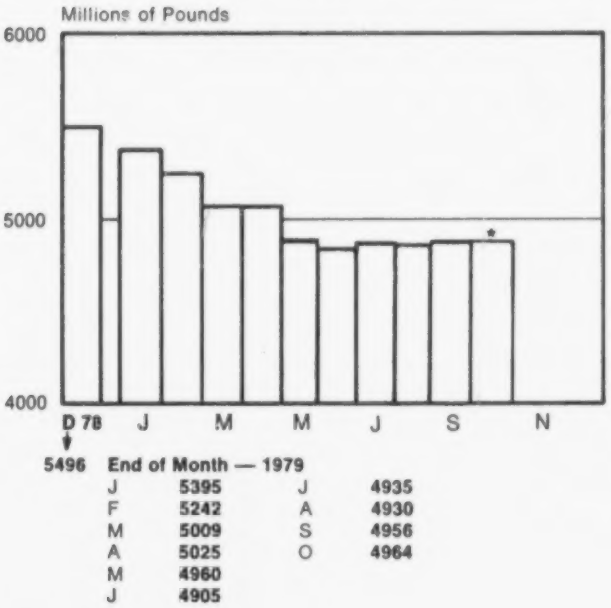
Producer Stocks Up Slightly

Producer inventories increased an estimated 8 million pounds in October, 1979, from 4,956 million pounds in September to an estimated 4,964 million pounds.

Integrated producer stocks went up 1 million pounds; secondary smelters were unchanged, and nonintegrateds' stocks increased 7 million pounds.

Inventories through 10 months of 1979 were down an estimated 532 million pounds from year-end 1978.

Inventories



Producer Inventories
(Millions of Pounds)

Producers	Oct '79	Sep '79	Oct '79 vs. Year End '78
Integrateds	4,044	4,043	−415
Smelters	262	262	+ 1
Nonintegrated	658	651	−118
TOTAL	4,964	4,956	−532

* Latest month estimated by Aluminum Association. Previous data—Bureau of the Census. Inventories include ingot, mill products and scrap.

Imports and Exports
(Millions of Pounds)

		1979 October	1979 September	1978 October	% Change Latest Month 1979 v. 1978
Imports	Mill Products	22.5	21.6	35.4	− 36.4
	Ingot	78.7	63.7	173.7	− 54.7
	TOTAL	101.2	85.3	209.1	− 51.6
	Scrap (+ dross)	10.6	8.6	16.4	− 35.4
Exports	Mill Products	59.3	44.1	35.6	+ 66.6
	Ingot	38.4	16.8	35.5	+ 8.2
	TOTAL	97.7	60.9	71.1	+ 37.4
	Scrap	56.2	49.3	35.2	+ 59.7
Net Imports		(42.1)	(16.3)	119.2	−135.3

Source: Department of Commerce, Industry Trade Administration and Bureau of the Census. Exports exclude backed foil.

Our Best Wishes for a Happy Holiday Season!

The Aluminum Situation

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Economic Affairs Department 202-862-5100

January, 1980

Shipments up 1.5 Per Cent

Net shipments of aluminum ingot and mill products through November, 1979, at an estimated 13,358 million pounds were 1.5% higher than shipments of 13,155 million pounds for 11 months of 1978.

Domestic shipments totalled 12,462 million pounds through November, 1979, representing a decrease of 0.2% below the 12,488 million pounds shipped in the first 11 months of 1978.

Thru November 1979

	11 Mos. 1979	11 Mos. 1978	% Change
Mill Products	10,740	10,781	− 0.4
Ingot	2,618	2,374	+10.3
Total	13,358	13,155	+ 1.5
Less Exports	−896	−667	+34.3
Domestic Total	12,462	12,488	− 0.2

Millions of Pounds

Source: Latest month estimated by the Aluminum Association. Previous data—Bureau of the Census.

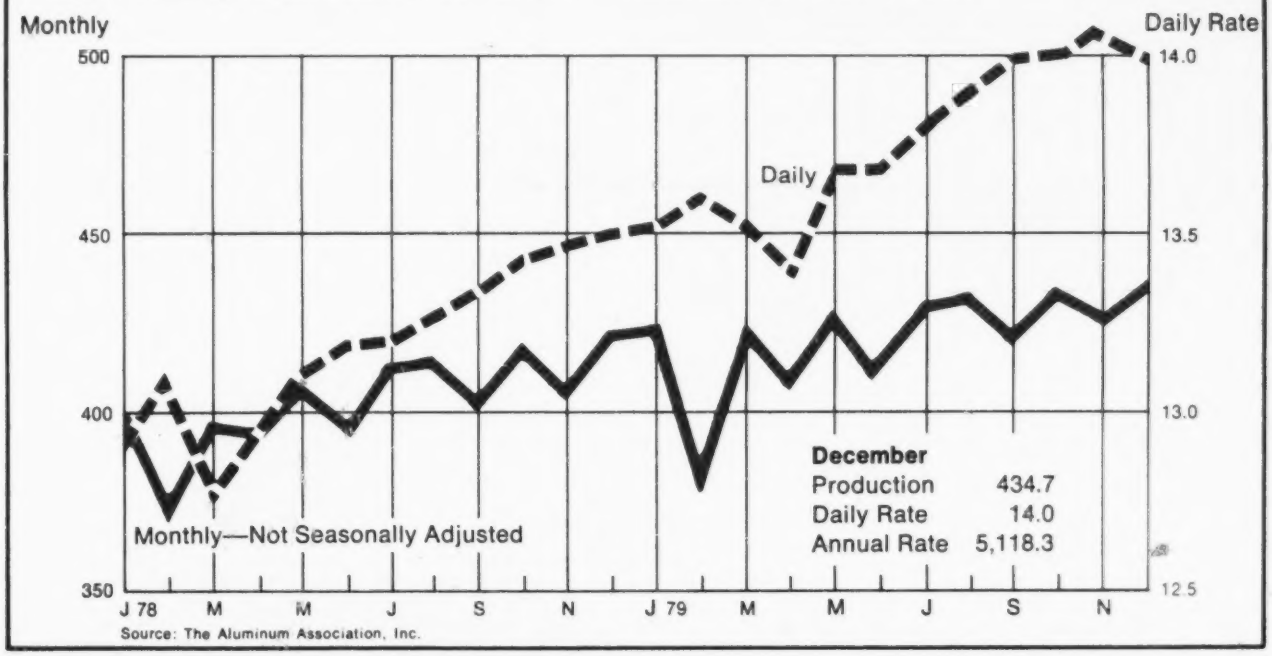
1979 Primary Production Up 4.6% vs. 1978

U.S. primary aluminum production for 1979 totalled 5,023,092 short tons, up 4.6% over the 1978 total of 4,803,777 short tons. During December, 1979, production averaged 14,023 short tons daily vs. 13,500 tons a day in December, 1978.

The annual rate of production in December, 1979 was 5,118,265 tons, compared to 4,927,347 tons in December, 1978. The November production rate was 5,149,469 tons.

Actual production in December, 1979 was 434,702 tons. This compared with 418,487 tons in December, 1978 and 423,244 tons in November, 1979.

U.S. Primary Aluminum Production—Thousands of Short Tons



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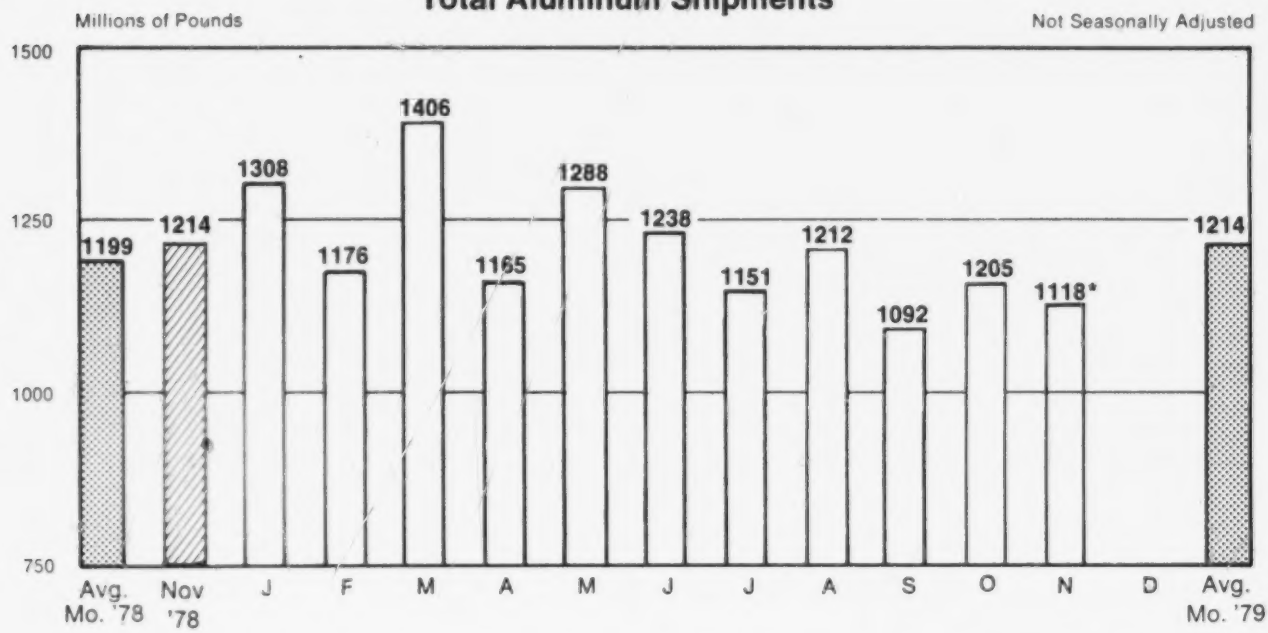
Total Aluminum Shipments



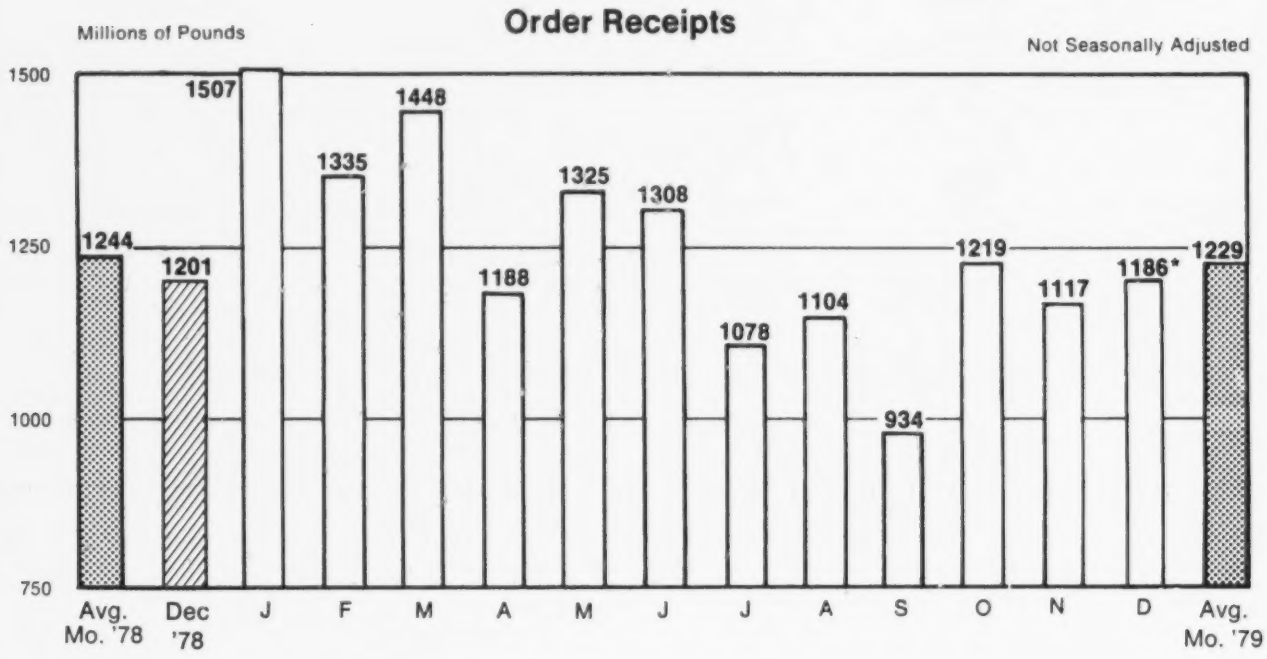
Net Shipments
(Millions of Pounds)

	1979		1978	% Change Latest Month
	November*	October	November	1979 v. 1978
Sheet & Plate	452.0	499.0	519.4	−13.0
Foil	66.0	76.4	76.6	−13.8
Rod, Bar & Wire	35.0	38.0	32.1	+ 9.0
Electrical Conductor	70.0	78.3	67.6	+ 3.6
Extruded Products	177.0	201.4	209.8	−15.6
Welded Tube	6.0	4.8	5.4	+11.1
Powder & Pigments	7.0	9.2	12.9	−45.7
Forgings & Impacts	12.0	12.7	11.6	+ 3.4
Net Imports of Mill Products (Total) (a)	23.0	21.4	35.0	−34.3
Total Mill Products	848.0	941.2	970.4	−12.6
Ingot	270.0(b)	263.6	243.7	+10.8
TOTAL INDUSTRY SHIPMENTS	1,118.0	1,204.8	1,214.1	− 7.9
Exports	(83.6)	(97.7)	(85.6)	− 2.2
TOTAL DOMESTIC SHIPMENTS	1,034.4	1,107.1	1,128.5	− 8.3

* Latest month estimated by the Aluminum Association.
Previous data—Bureau of the Census and Department of Commerce.
(a) Not included in product data above.
(b) Sufficient data not available for reliable estimate. Implicit in this item is a 10 to 25% variation.

November Shipments Down 7.9 Per Cent from Year Ago

Total November net shipments of 1,118 million pounds were down an estimated 7.9% vs. November, 1978. They were also down about 7.2% from October, 1979 shipments of 1,205 million pounds. Domestic shipments were down 8.3% below November, 1978, and 6.8% below October, 1979.



Order Receipts
Millions of Pounds

	1979		1978	% Change
	December*	November	December	Latest Month 1979 v. 1978
Can Stock	225.7	185.4	128.5	+75.6
Sheet & Plate, Other	294.1	287.1	345.1	−14.8
Foil	65.9	67.2	66.1	− 0.3
Rod, Bar & Wire	17.0	25.4	21.9	−22.4
Electrical Conductor	55.7	51.4r	92.2	−39.6
Extruded Products	151.5	151.4	179.1	−15.4
Primary Ingot	42.5	62.5r	78.5	−45.9
Other (Including Secondary Ingot)	230.6	194.2	169.0	+36.4
TOTAL DOMESTIC	1,083.0	1,024.6r	1,080.4	+ 0.2
Exports	103.2	92.5	120.1	−14.1
TOTAL ALL PRODUCTS	1,186.2	1,117.1r	1,200.5	− 1.2

Source: The Association estimates total industry orders, based on weekly reports by members of new orders (less cancellations) received. The Association expands these data to total industry utilizing an expansion ratio that attempts to reflect the relationship of reporters to the total industry. Weekly data are available upon request.

* Latest month.
r-revised.

December Orders Down 1.2% From Year Ago

December order receipts at 1,186 million pounds were down 1.2% from December, 1978 orders of 1,201 million pounds. However, they represented an increase of 6.2% over November, 1979.

Order receipts for the year 1979 totalled 14,748 million pounds, only 177 million pounds (or 1.2%) less than 1978's total of 14,925 million pounds.

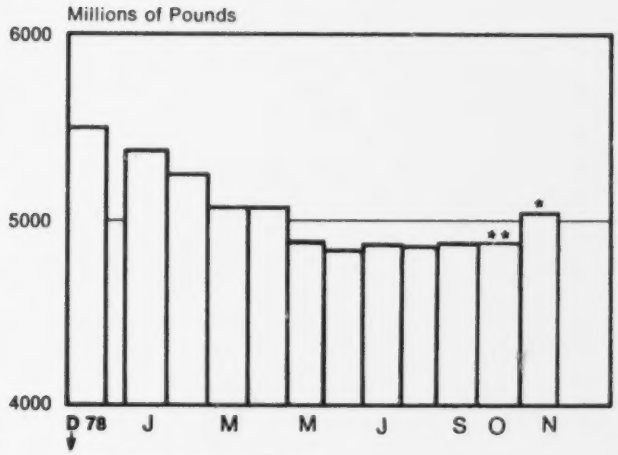
Producer Stocks Increased

Producer inventories increased an estimated 70 million pounds in November, 1979, from 4,960 million pounds in October to an estimated 5,030 million pounds.

Integrated producer stocks went up 38 million pounds. Secondary smelters' and nonintegrateds' stocks increased 32 million pounds.

Inventories through 11 months of 1979 were down an estimated 466 million pounds from year-end 1978.

Inventories



5496 End of Month — 1979

J	5395	J	4935
F	5242	A	4930
M	5009	S	4958
A	5025	O	4960
M	4960	N	5030
J	4905		

Producer Inventories
(Millions of Pounds)

Producers	Nov '79*	Oct '79**	Nov '79 vs. Year End '78
Integrateds	4,082	4,044	−377
Smelters	268	247	+ 7
Nonintegrated	680	669	− 96
TOTAL	5,030	4,960	−466

* Latest month estimates by Aluminum Association. Previous data—Bureau of the Census. Inventories include ingot, mill products and scrap.
** Estimated by Aluminum Association. October inventory published by Bureau of Census will be revised.

Imports and Exports
(Millions of Pounds)

		1979		1978	% Change Latest Month 1979 v. 1978
		November	October	November	
Imports	Mill Products	23.9	22.5	36.7	− 34.9
	Ingot	82.3	78.7	86.1	− 4.4
	TOTAL	106.2	101.2	122.8	− 13.5
	Scrap (+ dross)	12.4	10.6	25.1	− 50.6
Exports	Mill Products	49.2	59.3	39.4	+ 24.9
	Ingot	34.4	38.4	46.2	− 25.5
	TOTAL	83.6	97.7	85.6	− 2.3
	Scrap	57.2	56.2	42.8	+ 33.6
Net Imports		(22.2)	(42.1)	19.5	−213.9

Source: Department of Commerce, Industry Trade Administration and Bureau of the Census. Exports exclude backed foil.

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Economic Affairs Department 202-862-5100

February, 1980

Annual Shipments Up 0.7 Per Cent

Net shipments of aluminum ingot and mill products through December, 1979, at an estimated 14,489 million pounds were 0.7% higher than shipments of 14,390 million pounds for 12 months of 1978.

Domestic shipments totalled 13,466 million pounds through December, 1979, representing a decrease of 1.3% below the 13,643 million pounds shipped in the first 12 months of 1978.

Exports of 1,023 million pounds were up 36.9% vs. 747 million pounds for 12 months of 1978.

Thru December 1979 (Preliminary)

	12 Mos. 1979	12 Mos. 1978	% Change
Mill Products	11,591	11,740	− 1.3
Ingot	2,898	2,650	+ 9.4
Total	14,489	14,390	+ 0.7
Less Exports	−1,023	−747	+36.9
Domestic Total	13,466	13,643	− 1.3

Millions of Pounds

Source: Latest month estimated by the Aluminum Association. Previous data—Bureau of the Census.

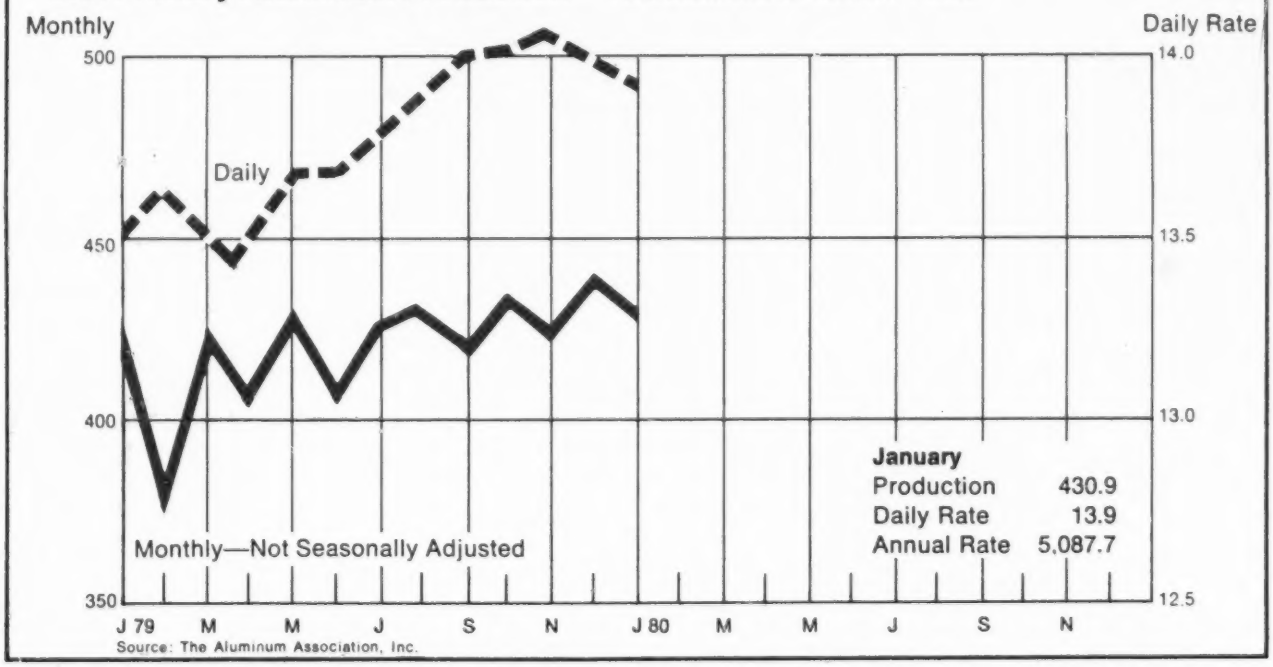
Primary Production Rate Up 3.1 Per Cent

U.S. primary aluminum production averaged 13,901 short tons daily during January, 1980, compared with an average 13,493 tons a day in January, 1979.

The annual rate of production in January, 1980 was 5,087,677 tons, compared to 4,924,969 tons in January, 1979. The December, 1979 production rate was 5,118,265 tons.

Actual production in January, 1980 was 430,924 tons. This compared with 418,285 tons in January, 1979 and 434,702 tons in December, 1979.

U.S. Primary Aluminum Production—Thousands of Short Tons



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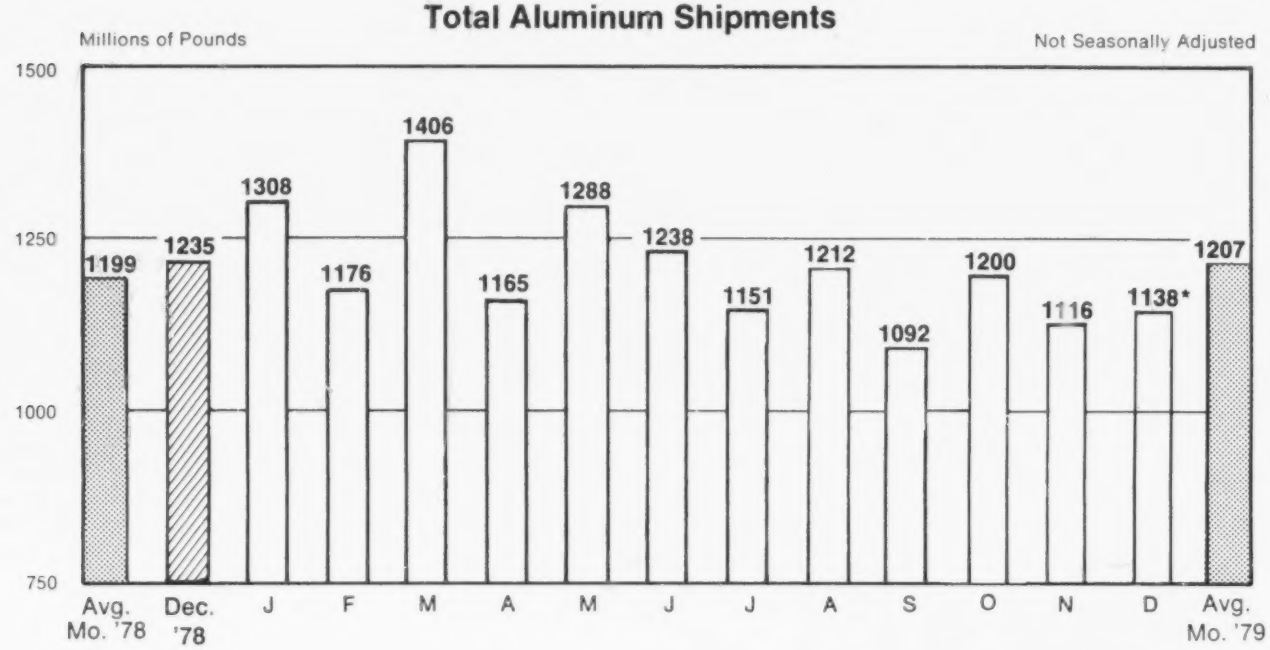

Net Shipments
(Millions of Pounds)

	1979		1978	% Change
	December*	November	December	Latest Month 1979 v. 1978
Sheet & Plate	466.0	449.3	522.9	−10.9
Foil	65.0	66.1	75.5	−13.9
Rod, Bar & Wire	34.0	31.8	40.8	−16.7
Electrical Conductor	66.0	68.7	68.8	− 4.1
Extruded Products	169.0	185.8	188.4	−10.3
Welded Tube	6.0	6.7	6.6	− 9.1
Powder & Pigments	7.0	9.4	13.7	−48.9
Forgings & Impacts	10.0	11.8	11.7	−14.5
Net Imports of Mill Products (Total) (a)	20.0	22.9	31.0	−35.5
Total Mill Products	843.0	852.5	959.4	−12.1
Ingot	295.0(b)	263.9	276.0	+ 6.9
TOTAL INDUSTRY SHIPMENTS	1,138.0	1,116.4	1,235.4	− 7.9
Exports	(127.1)	(83.6)	(80.9)	+57.1
TOTAL DOMESTIC SHIPMENTS	1,010.9	1,032.8	1,154.5	−12.4

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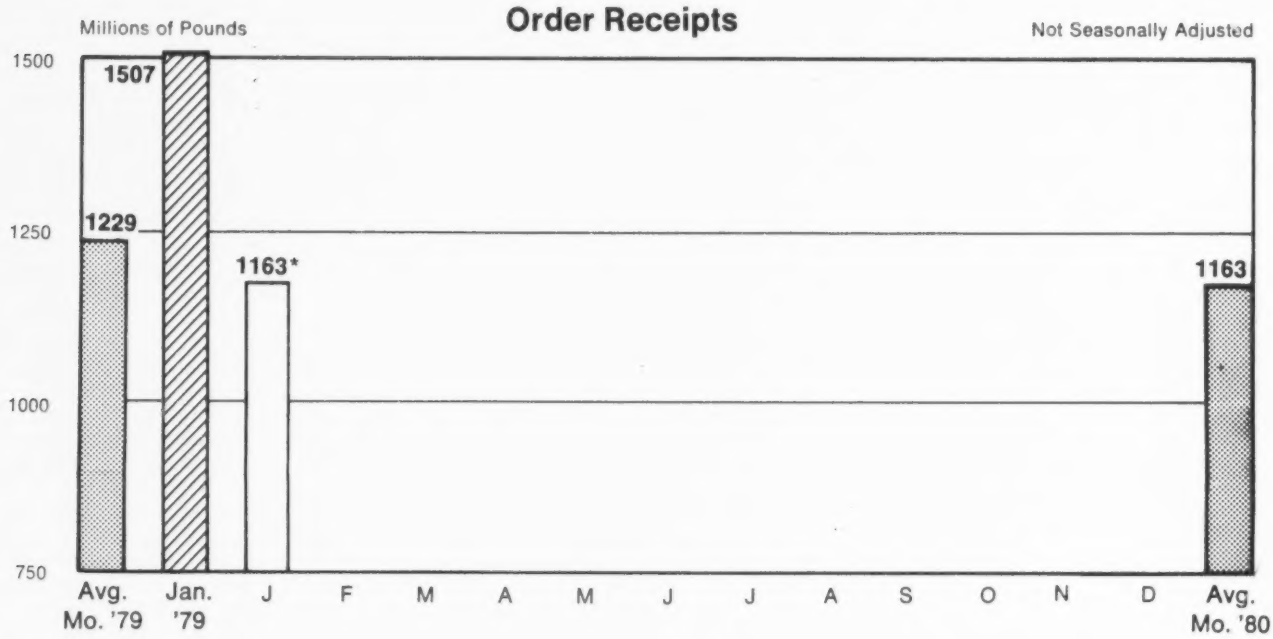
Previous data—Bureau of the Census and Department of Commerce.
(a) Not included in product data above.
(b) Sufficient data not available for reliable estimate. Implicit in this item is a 10 to 25% variation.

December Shipments Down 7.9 Per Cent vs. December, 1978

Total December net shipments of 1,138 million pounds were down an estimated 7.9% vs. December, 1978. They were up about 1.9% over November, 1979 shipments of 1,116 million pounds. Domestic shipments were down 12.4% below December, 1978, and 2.1% below November, 1979.



Order Receipts
Millions of Pounds

	1980 January*	1979 December	1979 January	% Change Latest Month 1979 v. 1978
Can Stock	212.6	225.7	281.1	−24.4
Sheet & Plate, Other	335.7	294.1	401.6	−16.4
Foil	60.0	65.9	77.8	−22.9
Rod, Bar & Wire	25.3	17.0	24.3	+ 4.1
Electrical Conductor	68.3	55.8r	83.0	−17.7
Extruded Products	140.8	151.4r	271.4	−48.1
Primary Ingot	78.7	44.3r	98.8	−20.3
Other (Including Secondary Ingot)	162.0	229.5r	207.5	−21.9
TOTAL DOMESTIC	1,083.4	1,083.7r	1,445.5	−25.1
Exports	79.4	103.0r	61.5	+29.1
TOTAL ALL PRODUCTS	1,162.8	1,186.7r	1,507.0	−22.8

Source: The Association estimates total industry orders, based on weekly reports by members of new orders (less cancellations) received. The Association expands these data to total industry utilizing an expansion ratio that attempts to reflect the relationship of reporters to the total industry. Weekly data are available upon request.

* Latest month.
r-revised.

January Orders 2.0% Below December, 1979

January order receipts at 1,163 million pounds were down 2.0% from December, 1979 orders of 1,187 million pounds. However, they were 22.8% below January, 1979 orders, which at 1,507 million pounds, represented an all-time record month. Domestic orders for January totalled 1,083 million pounds, no change from December, 1979.

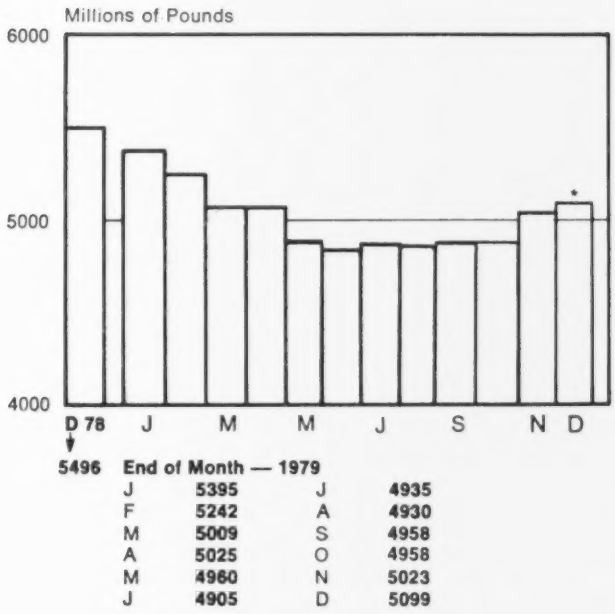
Producer Stocks Rising

Producer inventories increased an estimated 76 million pounds in December, 1979, from 5,023 million pounds in November to an estimated 5,099 million pounds.

Integrated producer stocks went up 59 million pounds. Secondary smelters' and nonintegrateds' stocks together increased 17 million pounds.

Preliminary estimates indicate that producer inventories at the end of 1979 declined 397 million pounds vs. year-end 1978.

Inventories



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J	5395	J	4935
F	5242	A	4930
M	5009	S	4958
A	5025	O	4958
M	4960	N	5023
J	4905	D	5099

Producer Inventories
(Millions of Pounds)

Producers	Dec. '79*	Nov. '79	Dec. '79 vs. Year End '78
Integrateds	4,139	4,080	−320
Smelters	250	242	− 11
Nonintegrated	710	701	− 66
TOTAL	5,099	5,023	−397

* Latest month estimated by Aluminum Association. Previous data—Bureau of the Census. Inventories include ingot, mill products and scrap.

Imports and Exports
(Millions of Pounds)

		1979		1978	% Change Latest Month 1979 v. 1978
		December	November	December	
Imports	Mill Products	21.1	23.9	37.1	− 43.1
	Ingot	125.2	82.3	70.0	+ 78.9
	TOTAL	146.3	106.2	107.1	+ 36.6
	Scrap (+ dross)	10.9	12.4	20.5	− 46.8
Exports	Mill Products	59.9	49.2	52.3	+ 14.5
	Ingot	67.2	34.4	28.6	+135.0
	TOTAL	127.1	83.6	80.9	+ 57.1
	Scrap	68.6	57.2	36.6	+ 87.4
Net Imports		(38.5)	(22.2)	10.1	−481.2

Source: Department of Commerce, Industry Trade Administration and Bureau of the Census. Exports exclude backed foil.

The year 1979 saw imports decline 478 million pounds and exports rise by 501 million pounds. Net imports dropped to 81 million pounds vs. 1,060 million pounds at year-end 1978.

The Aluminum Situation

A Monthly Publication of
The Aluminum Association, Inc., 818 Connecticut Avenue, NW, Washington, DC 20006

Economic Affairs Department 202-862-5100

March, 1980

Shipments Down 6.8 Per Cent

Net shipments of aluminum ingot and mill products in January, 1980, at an estimated 1,218 million pounds were 6.8% lower than shipments of 1,307 million pounds for the first month of 1979.

Domestic shipments totalled 1,104 million pounds in January, 1980, representing a decrease of 7.9% below the 1,199 million pounds shipped in the first month of 1979.

Exports of 114 million pounds were up 5.6% vs. 108 million pounds for the first month of 1979.

Thru January 1980

	1 Mo. 1980	1 Mo. 1979	% Change
Mill Products	967	1,044	−7.4
Ingot	251	263	−4.6
Total	1,218	1,307	−6.8
Less Exports	−114	−108	+5.6
Domestic Total	1,104	1,199	−7.9

Millions of Pounds
Source: Latest month estimated by the Aluminum Association. Previous data—Bureau of the Census.

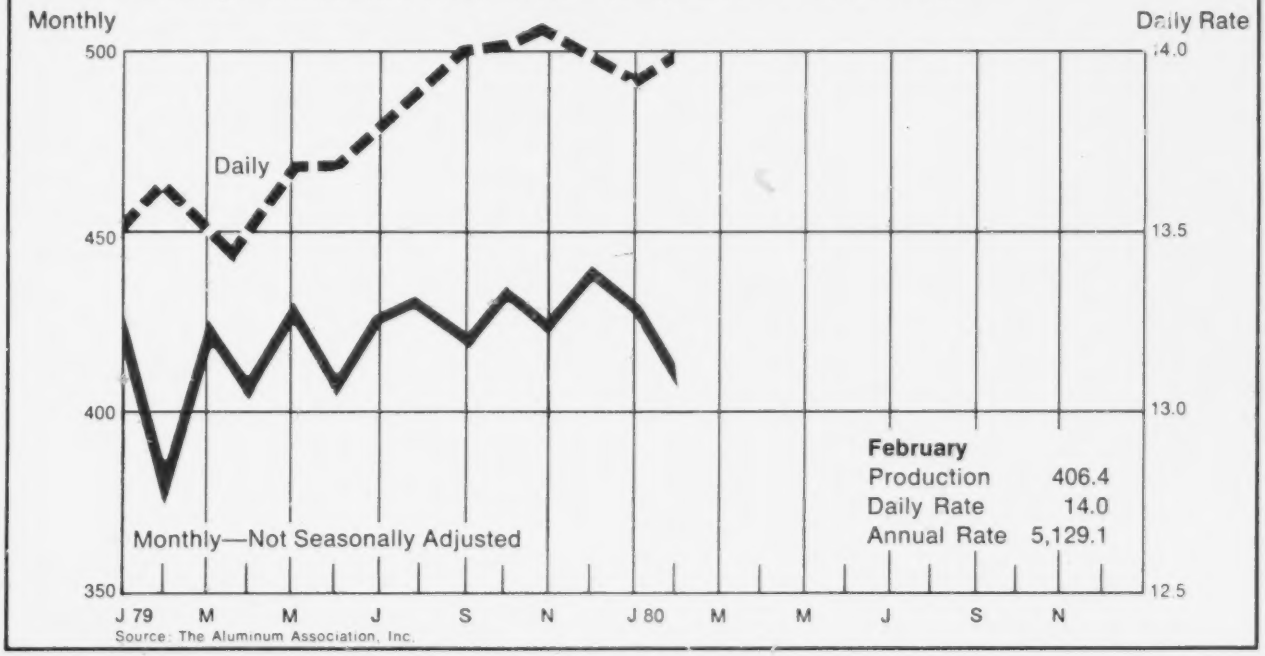
Primary Production Rate Up 3.4 Per Cent

U.S. primary aluminum production averaged 14,014 short tons daily during February, 1980, compared with an average 13,550 tons a day in February, 1979.

The annual rate of production in February, 1980 was 5,129,074 tons, compared to 4,945,815 tons in February, 1979. The January, 1980 production rate was 5,087,677 tons.

Actual production in February, 1980 was 406,402 tons. This compared with 379,405 tons in February, 1979 and 430,924 tons in January, 1980.

U.S. Primary Aluminum Production—Thousands of Short Tons



Source: The Aluminum Association, Inc.

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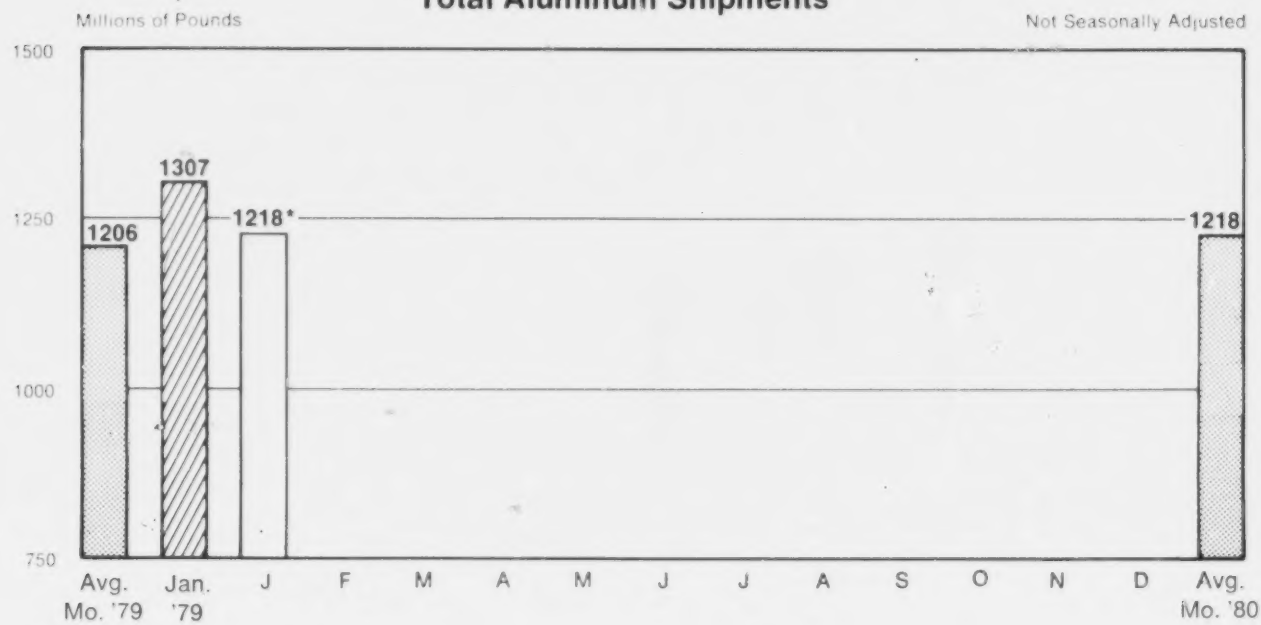
Total Aluminum Shipments



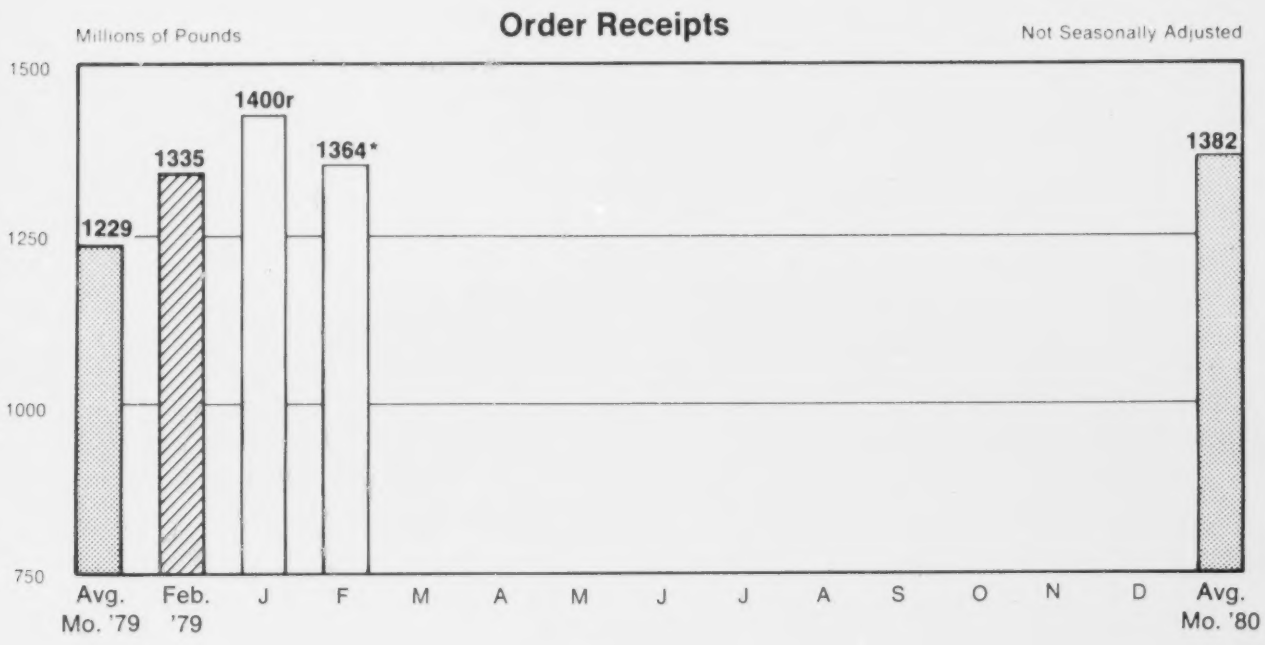
Net Shipments
(Millions of Pounds)

	1980 January*	1979 December	1979 January	% Change Latest Month 1980 v. 1979
Sheet & Plate	545.0	454.6	572.7	− 4.8
Foil	74.0	66.0	77.8	− 4.9
Rod, Bar & Wire	44.0	31.2	38.4	+14.6
Electrical Conductor	72.0	63.9	72.9	− 1.2
Extruded Products	187.0	160.8	216.2	−13.5
Welded Tube	5.0	6.4	6.0	−16.7
Powder & Pigments	9.0	8.4	9.7	− 7.2
Forgings & Impacts	12.0	9.9	12.8	− 6.3
Net Imports of Mill Products (Total) (a)	19.0	19.4	37.7	−49.6
Total Mill Products	967.0	820.6	1,044.2	− 7.4
Ingot	251.0(b)	313.2	263.2	− 4.6
TOTAL INDUSTRY SHIPMENTS	1,218.0	1,133.8	1,307.4	− 6.8
Exports	(114.0)	(127.1)	(108.4)	+ 5.2
TOTAL DOMESTIC SHIPMENTS	1,104.0	1,006.7	1,199.0	− 7.9

* Latest month estimated by the Aluminum Association.
Previous data—Bureau of the Census and Department of Commerce.
(a) Not included in product data above.
(b) Sufficient data not available for reliable estimate. Implicit in this item is a 10 to 25% variation.

January Shipments Down 6.8 Per Cent from Year Ago

Total January net shipments of 1,218 million pounds were down an estimated 6.8% vs. January, 1979. They were up about 7.4% from December, 1979 shipments of 1,134 million pounds. Domestic shipments were down 7.9% below January, 1979, but up 9.7% over December, 1979.



Order Receipts
Millions of Pounds

	1980 February*	1980 January	1979 February	% Change Latest Month 1980 v. 1979
Can Stock	178.7	238.9r	228.1	−21.7
Sheet & Plate, Other	464.9	416.0r	350.7	+32.6
Foil	71.4	70.7r	69.2	+ 3.2
Rod, Bar & Wire	35.1	29.4r	31.8	+10.4
Electrical Conductor	73.3	80.9r	68.2	+ 7.5
Extruded Products	178.5	173.8r	215.6	−17.2
Primary Ingot	93.3	96.3r	90.8	+ 2.8
Other (Including Secondary Ingot)	113.7	188.6r	194.3	−41.5
TOTAL DOMESTIC	1,208.9	1,294.6r	1,248.9	− 3.2
Exports	155.1	105.3r	86.0	+80.3
TOTAL ALL PRODUCTS	1,364.0	1,399.9r	1,334.9	+ 2.2

Source: The Association estimates total industry orders, based on weekly reports by members of new orders (less cancellations) received. The Association expands these data to total industry utilizing an expansion ratio that attempts to reflect the relationship of reporters to the total industry. Weekly data are available upon request.

* Latest month.
r-revised.

February Orders Up 2.2% From Year Ago

February order receipts at 1,364 million pounds were up 2.2% from February, 1979 orders of 1,335 million pounds. However, they were 2.6% below orders for January, 1980. Lower domestic orders for sheet, cans, extrusions and secondary ingot were offset by higher orders for export.

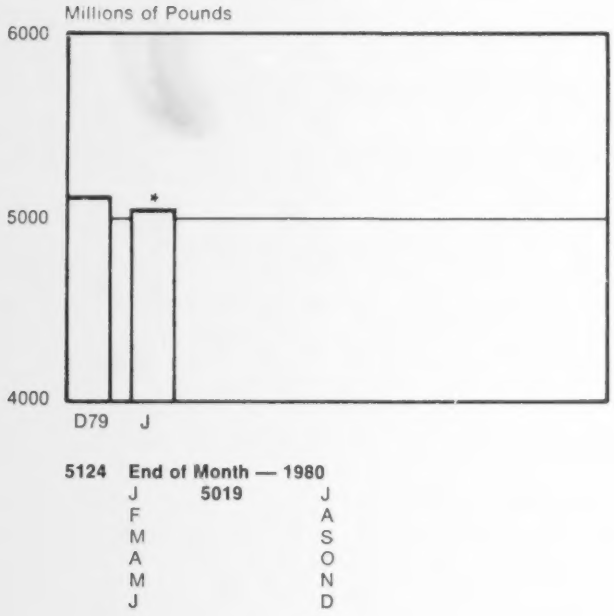
Producer Stocks Declined in January

Producer inventories decreased an estimated 105 million pounds in January, 1980, from 5,124 million pounds in December, 1979 to an estimated 5,019 million pounds.

Integrated producer stocks went down 50 million pounds, and nonintegrateds' stocks decreased 55 million pounds.

Preliminary published reports indicate that producer inventories at the end of 1979 declined 372 million pounds vs. year-end 1978.

Inventories



Producer Inventories
(Millions of Pounds)

Producers	Jan. '80*	Dec. '79	Jan. '80 vs. Year End '79
Integrateds	4,087	4,137	− 50
Smelters	232	232	—
Nonintegrated	700	755	− 55
TOTAL	5,019	5,124	−105

* Latest month estimated by Aluminum Association. Previous data—Bureau of the Census. Inventories include ingot, mill products and scrap.

Imports and Exports
(Millions of Pounds)

		1980 January	1979 December	1979 January	% Change Latest Month 1980 v. 1979
Imports	Mill Products	20.2	21.1	44.7	− 54.8
	Ingot	123.6	125.2	139.1	− 11.1
	TOTAL	143.8	146.3	183.8	− 21.8
	Scrap (+ dross)	10.1	10.9	9.0	+ 12.2
Exports	Mill Products	34.8	59.9	43.5	− 20.0
	Ingot	79.2	67.2	64.8	+ 22.2
	TOTAL	114.0	127.1	108.3	+ 5.3
	Scrap	68.7	68.6	35.1	+ 95.7
Net Imports		(28.8)	(38.5)	49.4	−158.3

Source: Department of Commerce, Industry Trade Administration and Bureau of the Census. Exports exclude backed foil.

The Aluminum Situation

A Monthly Publication of
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Economic Affairs Department 202-862-5100

April, 1980

Shipments Up 0.6 Per Cent

Net shipments of aluminum ingot and mill products through February, 1980 at an estimated 2,497 million pounds were 0.6% higher than shipments of 2,483 million pounds for 2 months of 1979.

Domestic shipments totalled 2,234 million pounds through February, 1980, representing a decline of 2.9% from the 2,300 million pounds shipped in the first 2 months of 1979.

Exports of 263 million pounds were up 43.7% vs. 183 million pounds for 2 months of 1979.

Thru February, 1980

	2 Mos. 1980	2 Mos. 1979	% Change
Mill Products	1,882	1,984	− 5.1
Ingot	615	499	+23.2
Total	2,497	2,483	+ 0.6
Less Exports	−263	−183	+43.7
Domestic Total	2,234	2,300	− 2.9

Millions of Pounds

Source: Latest month estimated by the Aluminum Association. Previous data—Bureau of the Census.

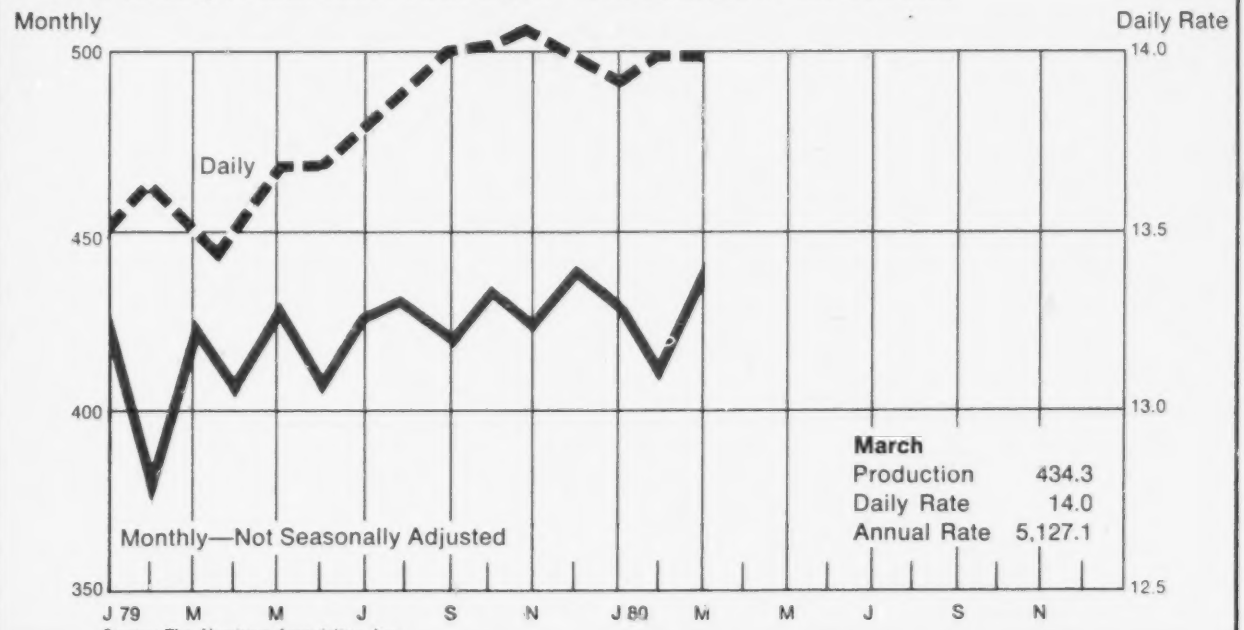
Primary Production Rate Up 3.6 Per Cent

U.S. primary aluminum production averaged 14,008 short tons daily during March, 1980, compared with an average 13,523 tons a day in March, 1979.

The annual rate of production in March, 1980 was 5,127,070 tons, compared to 4,935,954 tons in March, 1979. The February, 1980 production rate was 5,128,999 tons.

Actual production in March, 1980 was 434,260 tons. This compared with 419,218 tons in March, 1979 and 406,396 tons in February, 1980.

U.S. Primary Aluminum Production—Thousands of Short Tons



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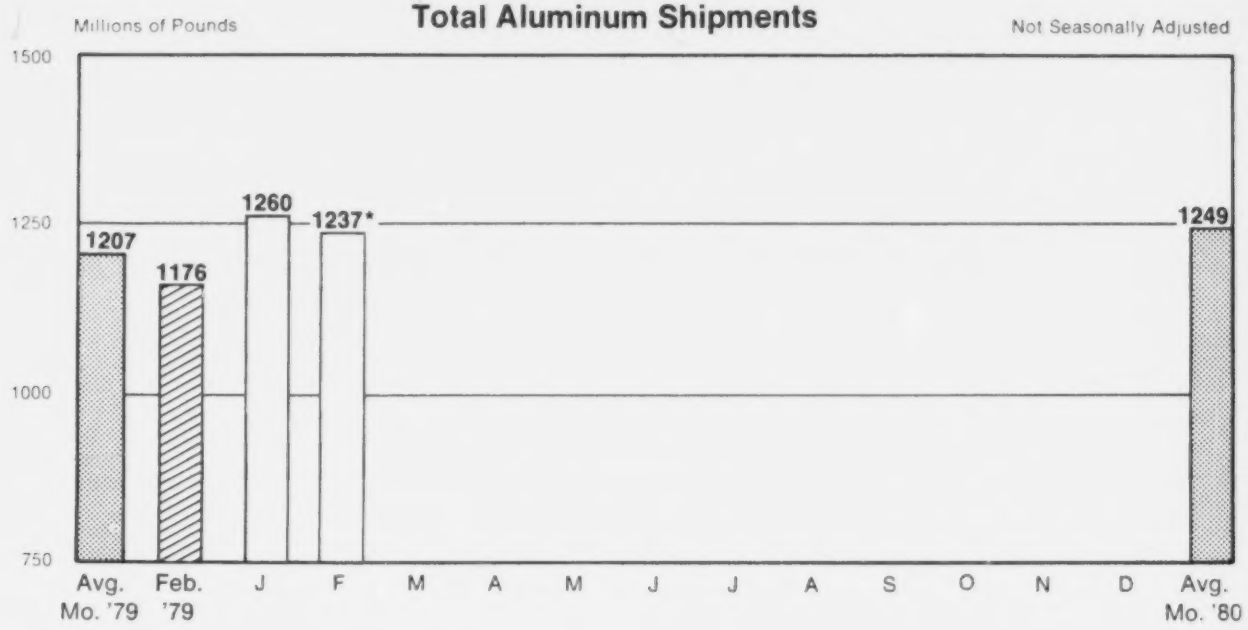


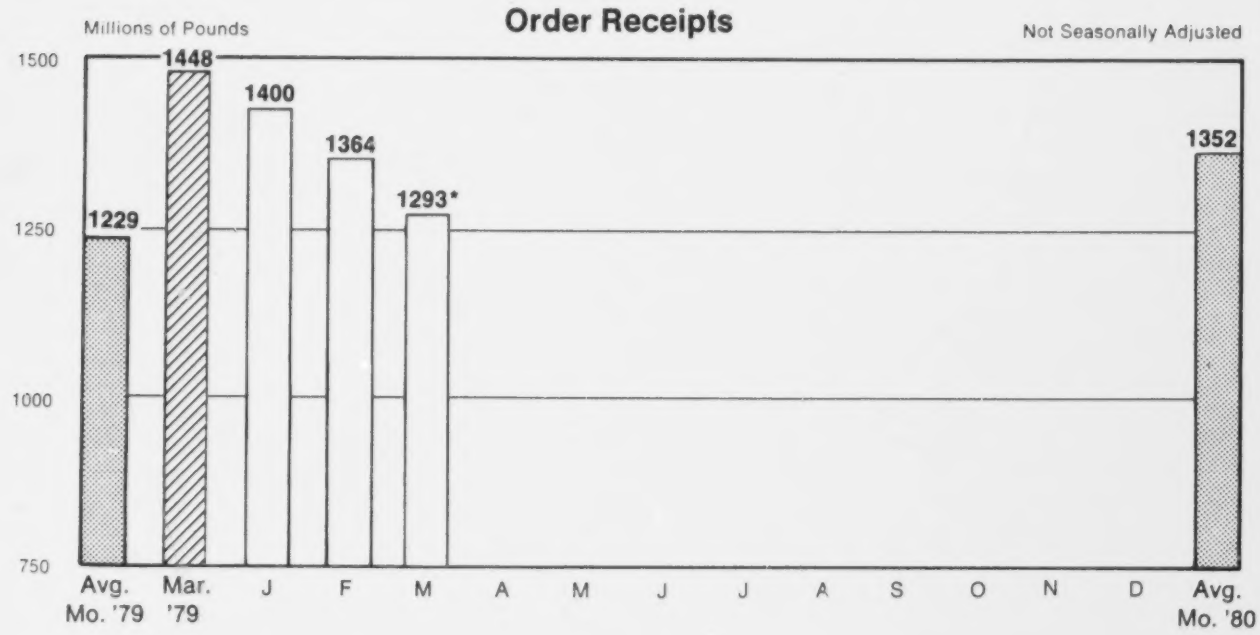
Net Shipments
(Millions of Pounds)

	1980 February*	1980 January	1979 February	% Change Latest Month 1980 v. 1979
Sheet & Plate	505.0	537.1	515.0	− 1.9
Foil	72.0	75.4	69.0	+ 4.3
Rod, Bar & Wire	43.0	36.5	28.8	+ 49.3
Electrical Conductor	72.0	70.7	68.8	+ 4.7
Extruded Products	189.0	199.6	200.6	− 5.8
Welded Tube	6.0	5.9	5.7	+ 5.3
Powder & Pigments	9.0	9.0	10.7	− 15.9
Forgings & Impacts	11.0	11.8	12.1	− 9.1
Net Imports of Mill Products (Total) (a)	13.0	15.6	29.1	− 55.3
Total Mill Products	920.0	961.6	939.8	− 2.1
Ingot	317.0(b)	298.6	236.2	+ 34.2
TOTAL INDUSTRY SHIPMENTS	1,237.0	1,260.2	1,176.0	+ 5.2
Exports	(149.0)	(114.0)	(74.4)	+ 100.3
TOTAL DOMESTIC SHIPMENTS	1,088.0	1,146.2	1,101.6	− 1.2

* Latest month estimated by the Aluminum Association.
Previous data—Bureau of the Census and Department of Commerce.
(a) Not included in product data above.
(b) Sufficient data not available for reliable estimate. Implicit in this item is a 10 to 25% variation.

February Shipments Up 5.2 Per Cent vs. Year Ago

Total February net shipments of 1,237 million pounds were up an estimated 5.2% vs. February, 1979. They were down about 1.8% from January, 1980. Domestic shipments were 1.2% below February, 1979, but 5.1% below the previous month.



Order Receipts
Millions of Pounds

	1980 March*	1980 February	1979 March	% Change Latest Month 1980 v. 1979
Can Stock	237.0	178.7	222.6	+ 6.5
Sheet & Plate, Other	380.0	464.9	395.7	− 4.0
Foil	75.6	71.4	77.0	− 1.8
Rod, Bar & Wire	36.1	35.1	60.3	−40.1
Electrical Conductor	69.5	73.3	71.2	− 2.4
Extruded Products	186.8	178.5	222.9	−16.2
Primary Ingot	101.3	93.3	85.0	+19.2
Other (Including Secondary Ingot)	113.1	113.7	221.8	−49.0
TOTAL DOMESTIC	1,199.3	1,208.9	1,356.5	−11.6
Exports	93.9	155.1	91.4	+ 2.7
TOTAL ALL PRODUCTS	1,293.2	1,364.0	1,447.9	−10.7

Source: The Association estimates total industry orders, based on weekly reports by members of new orders (less cancellations) received. The Association expands these data to total industry utilizing an expansion ratio that attempts to reflect the relationship of reporters to the total industry. Weekly data are available upon request.

* Latest month.
r-revised.

March Orders Down 10.7 Per Cent From Year Ago

March order receipts at 1,293 million pounds were down 10.7% from March, 1979 orders of 1,448 million pounds. They were also down 5.2% from February, 1980. For the first quarter of 1980, order receipts totalled 4,057 million pounds, down 5.4% from 4,290 million pounds in 1979's first three months.

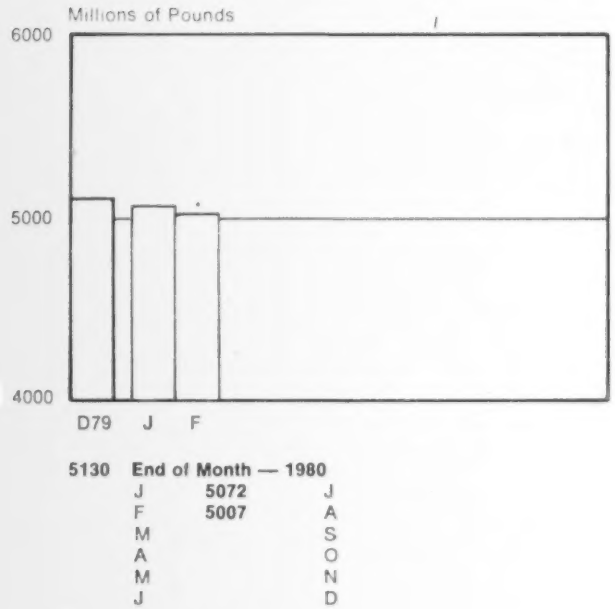
Producer Stocks Down in February

Producer inventories declined an estimated 65 million pounds in February, 1980, from 5,072 million pounds in January to an estimated 5,007 million pounds.

Integrated producer stocks went down 32 million pounds, and nonintegrateds' stocks dropped 33 million pounds.

Revised data indicate that producer inventories at the end of 1979 declined 366 million pounds vs. year-end 1978.

Inventories



5130 End of Month — 1980

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Producer Inventories
(Millions of Pounds)

Producers	Feb. '80*	Jan. '80*	Feb. '80 vs. Year End '79
Integrateds	4,070	4,102	− 72
Smelters	222	222	− 12
Nonintegrated	715	748	− 39
TOTAL	5,007	5,072	−123

* Latest month estimated by Aluminum Association. Previous data—Bureau of the Census. Inventories include ingot, mill products and scrap.

Imports and Exports
(Millions of Pounds)

		1980 February	1980 January	1979 February	% Change Latest Month 1980 v. 1979
Imports	Mill Products	17.1	20.2	33.6	− 49.1
	Ingot	90.5	123.6	82.0	+ 10.4
	TOTAL	107.6	143.8	115.6	− 6.9
	Scrap (+ dross)	10.8	10.1	12.1	− 10.7
Exports	Mill Products	73.6	34.8	43.5	+ 69.2
	Ingot	75.4	79.2	30.9	+144.0
	TOTAL	149.0	114.0	74.4	+100.3
	Scrap	77.7	68.7	41.0	+ 89.5
Net Imports		(108.3)	(28.8)	12.3	−880.5

Source: Department of Commerce, Industry Trade Administration and Bureau of the Census. Exports exclude backed foil.

The Aluminum Situation

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The Aluminum Association, Inc., 818 Connecticut Avenue, NW, Washington, DC 20006

Economic Affairs Department 202-862-5100

May, 1980

First Quarter Shipments Down 3.7 Per Cent

Net shipments of aluminum ingot and mill products through March, 1980 at an estimated 3,804 million pounds were 3.7% less than shipments of 3,950 million pounds for 3 months of 1979.

Domestic shipments totalled 3,382 million pounds through March, 1980, representing a decline of 8.4% from the 3,692 million pounds shipped in the first 3 months of 1979.

Exports of 422 million pounds were up 63.6% vs. 258 million pounds for 3 months of 1979.

Thru March, 1980

	3 Mos. 1980	3 Mos. 1979	% Change
Mill Products	2,859	3,104	-- 7.9
Ingot	945	846	+11.7
Total	3,804	3,950	– 3.7
Less Exports	–422	–258	+63.6
Domestic Total	3,382	3,692	– 8.4

Millions of Pounds

Source: Latest two months estimated by the Aluminum Association. Previous data—Bureau of the Census.

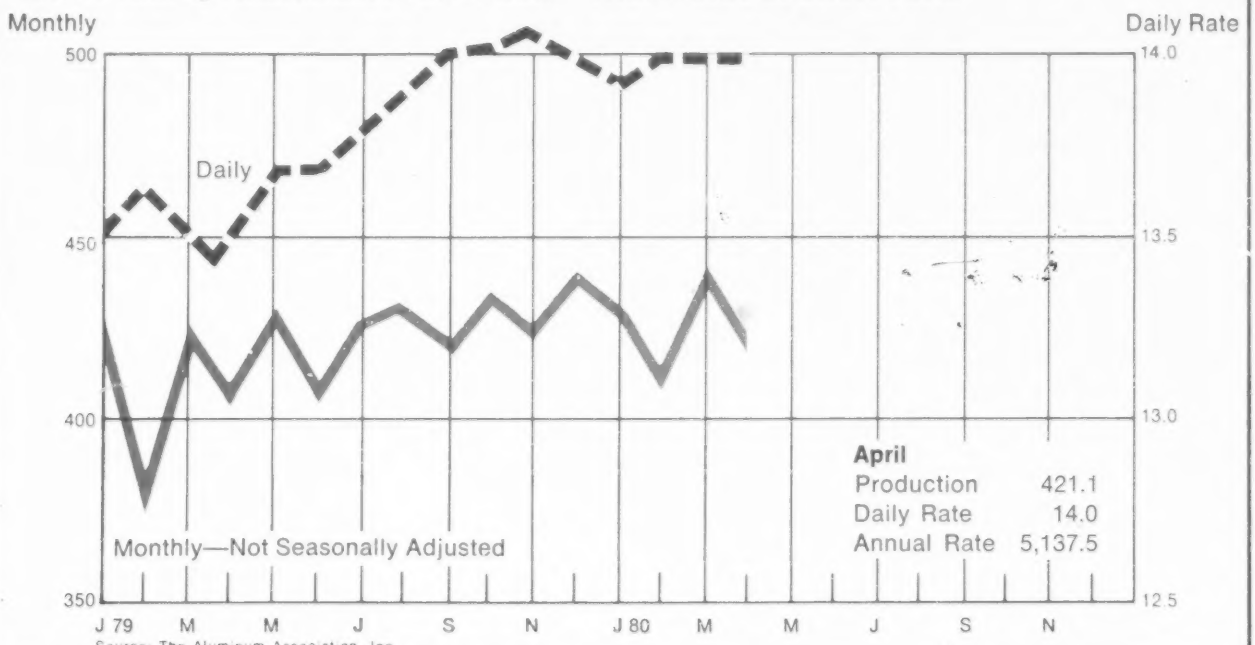
Primary Production Rate Up 4.8 Per Cent

U.S. primary aluminum production averaged 14,037 short tons daily during April, 1980, compared with an average 13,393 tons a day in April, 1979.

The annual rate of production in April, 1980 was 5,137,481 tons, compared to 4,888,390 tons in April, 1979. The March, 1980 production rate was 5,127,070 tons.

Actual production in April, 1980 was 421,105 tons. This compared with 401,786 tons in April, 1979 and 434,260 tons in March, 1980.

U.S. Primary Aluminum Production—Thousands of Short Tons



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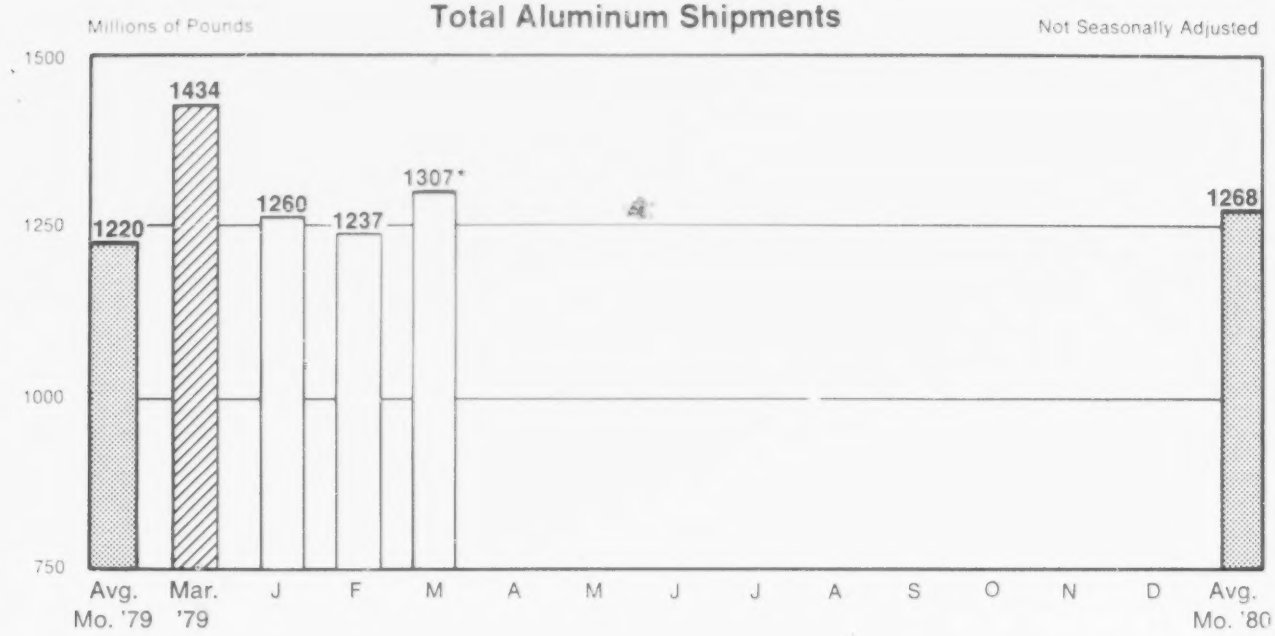


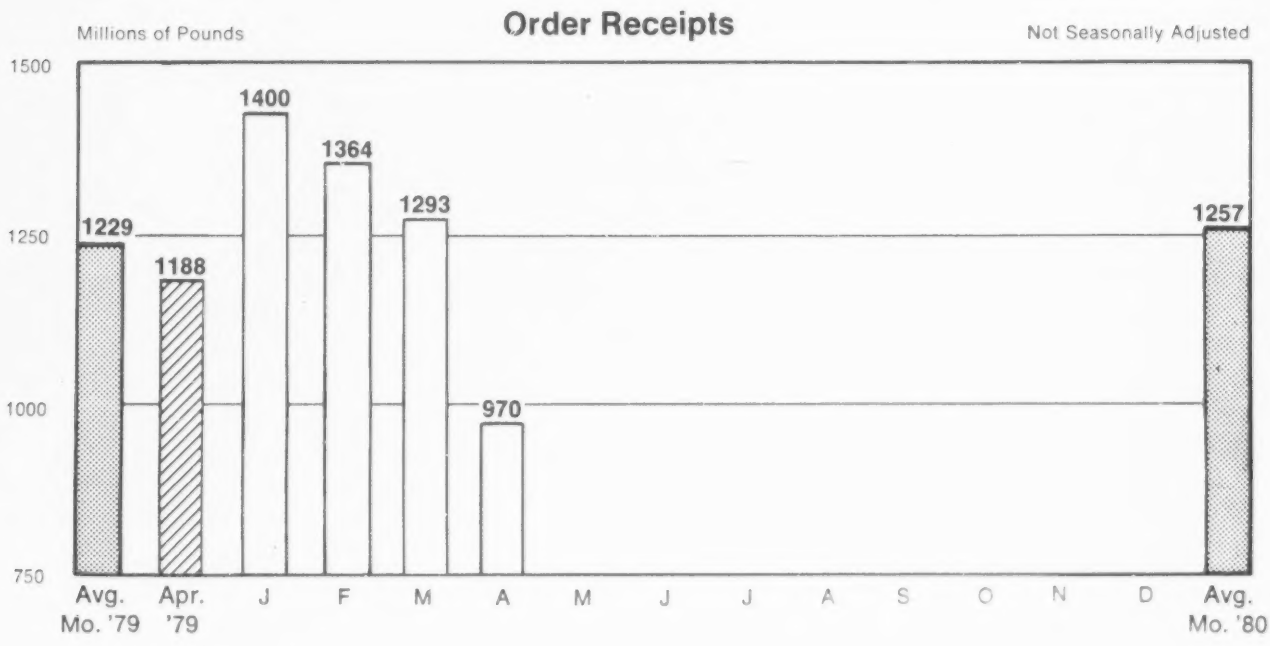
Net Shipments
(Millions of Pounds)

	1980 March*	1980 February*	1979 March	% Change Latest Month 1980 v. 1979
Sheet & Plate	543.0	505.0	632.2	− 14.1
Foil	83.0	72.0	85.8	− 3.3
Rod, Bar & Wire	43.0	43.0	34.0	+ 26.5
Electrical Conductor	72.0	72.0	78.5	− 8.3
Extruded Products	193.0	189.0	231.3	− 16.6
Welded Tube	7.0	6.0	8.8	− 20.5
Powder & Pigments	11.0	9.0	13.1	− 16.0
Forgings & Impacts	13.0	11.0	14.6	− 11.0
Net Imports of Mill Products (Total) (a)	12.0	13.0	33.1	− 63.7
Total Mill Products	977.0	920.0	1,131.4	− 13.6
Ingot	330.0(b)	317.0	302.2	+ 9.2
TOTAL INDUSTRY SHIPMENTS	1,307.0	1,237.0	1,433.6	− 8.8
Exports	(158.8)	(149.0)	(75.3)	+110.9
TOTAL DOMESTIC SHIPMENTS	1,148.2	1,088.0	1,358.3	− 15.5

* Latest two months estimated by the Aluminum Association.
Previous data—Bureau of the Census and Department of Commerce.
(a) Not included in product data above.
(b) Sufficient data not available for reliable estimate. Implicit in this item is a 10 to 25% variation.

March Shipments Down 8.8 Per Cent vs. Year Ago

Total March net shipments of 1,307 million pounds were down an estimated 8.8% vs. March, 1979; however, March was the highest shipping month in 1979. March, 1980 was 5.7% higher than February. Domestic shipments were 15.5% below March, 1979, but 5.5% higher than February, 1980.



Order Receipts

Millions of Pounds

	1980 April*	1980 March	1979 April	% Change Latest Month 1980 v. 1979
Can Stock	223.7	237.0	155.7	+43.7
Sheet & Plate, Other	168.9	380.0	356.5	−52.6
Foil	60.2	75.6	61.5	− 2.1
Rod, Bar & Wire	29.2	36.1	55.2	−47.1
Electrical Conductor	46.0	69.5	81.3	−43.4
Extruded Products	159.0	186.8	226.1	−29.7
Primary Ingot	79.1	101.3	67.8	+16.7
Other (Including Secondary Ingot)	83.0	113.1	115.3	−28.0
TOTAL DOMESTIC	849.1	1,199.3	1,119.4	−24.1
Exports	121.0	93.9	68.1	+77.7
TOTAL ALL PRODUCTS	970.1	1,293.2	1,187.5	−18.3

Source: The Association estimates total industry orders, based on weekly reports by members of new orders (less cancellations) received. The Association expands these data to total industry utilizing an expansion ratio that attempts to reflect the relationship of reporters to the total industry. Weekly data are available upon request.

* Latest month.
r-revised.

April Orders Down 18.3 Per Cent From Year Ago

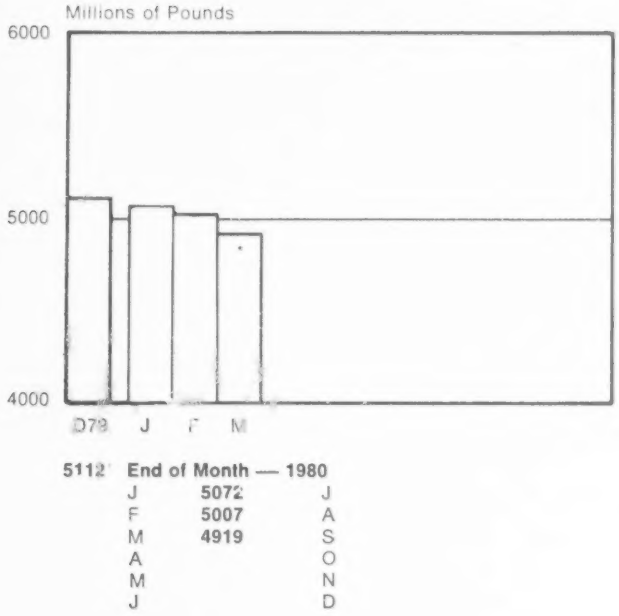
April order receipts at 970 million pounds were down 18.3% from April, 1979 orders of 1,188 million pounds. They were also down 25.0% from March, 1980.

Producer Stocks Down in March

Producer inventories declined an estimated 88 million pounds in March, 1980, from an estimated 5,007 million pounds in February to an estimated 4,919 million pounds.

Integrated producer stocks went down 73 million pounds. Secondary smelters' and nonintegrateds' stocks together dropped an estimated 15 million pounds.

Inventories



Producer Inventories
(Millions of Pounds)

Producers	Mar. '80*	Feb. '80 *	Mar. '80 vs. Year End '79
Integrateds	3,997	4,070	−127
Smelters	222	222	− 12
Nonintegrated	700	715	− 54
TOTAL	4,919	5,007	−193

* Latest two months estimated by Aluminum Association. Previous data—Bureau of the Census. Inventories include ingot, mill products and scrap.

Imports and Exports
(Millions of Pounds)

		1980 March	1980 February	1979 March	% Change Latest Month 1980 v. 1979
Imports	Mill Products	16.8	17.1	43.9	− 61.7
	Ingot	95.6	90.5	107.7	− 11.2
	TOTAL	112.4	107.6	151.6	− 25.9
	Scrap (+ dross)	11.8	10.8	15.4	− 23.4
Exports	Mill Products	53.2	73.6	45.8	+ 16.2
	Ingot	105.6	75.4	29.5	+258.0
	TOTAL	158.8	149.0	75.3	+110.9
	Scrap	88.6	77.7	51.8	+ 71.0
Net Imports		(123.2)	(108.3)	39.9	−308.8

Source: Department of Commerce, Industry Trade Administration and Bureau of the Census. Exports exclude backed foil.